

# **CADDIS Training**

## **CADDIS 101- Fundamentals System Administration**



# System Administration

- CADDIS Regional Center Structure
- System Security and Setup Activities
- Workflow and Alerts
- Signing and Co-signing

11/17/2003



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## Notes:

System administrators will have various rights to CADDIS based on Regional Center and job function. The system administrator has responsibility for assuring that the complete system (software, hardware, and networking elements) is correctly maintained. Each Regional Center will have their own "set-up" or structure. Their system administrator will establish Regional Center facilities, units, and departments in the system, which in CADDIS are known as such things as programs and organizations. They will also establish user IDs and assign users to various User Groups depending on their job functions. These user groups will be assigned access to various tabs that they need (for security reasons).

We have chosen to highlight a few key functions that are performed by system administrators.



## Regional Center Structure

- Structures are the CADDIS term for the hierarchical organizational structure in the system. Structures include Enterprise, Entity, Organization, Location and Program.
- Enterprise: the highest hierarchical object in the organizational structure.
- Entity: there are twenty-one entities in CADDIS, each representing a Regional Center.



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### Notes:

It is the responsibility of the system administrator at each Regional Center to define the following structures: organizations, facilities and programs. DDS will set up enterprises and entities (RCs). This slide provides you with the “big picture” of how CADDIS is set up.

Note the difference between structure set up, such as setting up a program, and Structure Security Objects (SSOs) which are Regional Centers.



## Regional Center Structure, continued

- Organization: each Regional Center can define one or more departments or divisions.
- Facility: each Regional Center can define one or more units or offices where services are provided.
- Program: each Regional Center can define one or more units and teams belonging to a Facility.





## System Security and Set-Up

- Unauthorized: Users cannot use the screen in any manner
- Select: Users can lookup and view records only
- Update: Users can lookup, view and update records
- Insert: Users can lookup, view, update and add records
- Delete: Users can lookup, view, update, add, and delete records.



### Notes:

System administrators set up new user accounts and are able to define security for those users. Users are attached to user groups and screen access privileges are assigned to the user group. Users can be assigned to an infinite number of user groups. The highest security for the groups will determine the user's access ability. The bulleted items on the slides are the levels of screen-based security in CADDIS.



## Signing and Cosigning

- Signing Records
- Assigning Signing Rights
- Signing Rights-Based on CADDIS Tab



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### Notes:

Certain records in CADDIS require users to sign the record to make it final and “official.”

System administrators have the responsibility of establishing these signing rights per designated record and user job role.

Some tabs may require that only a primary staff person approve a record and therefore sign it. Other tabs require that a primary staff person initially sign a record but that other departments review and sign off on it. In some cases general users assigned to specific job categories can sign a record while in other cases only supervisors or users with special designations can sign off on a tab.

Setup is on the tab level for each Regional Center.



## Workflow Designer

- The Workflow Designer is a tool that allows system administrators and DDS to specify actions that need to be performed by users in the system. The logic established to determine actions to be taken enables system administrators to create alerts that will be automatically sent to a user when an action is needed.
- For example, an alert can be created in CADDIS to inform staff of Consumers reaching age three who are designated as Early Start to determine if they need to be re-evaluated for a CDER assessment.



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### Notes:

Workflow is designed as set of steps that comprise a standardized business or clinical process or procedure(s) by which an agency carries out a variety of events and actions conducted during the course of doing business. These procedures may include treating a consumer, billing a consumer, certifying or maintaining employees, or other routine practices.

### Examples:

- A Service Plan is required for every consumer within 30 days of the service period begin date and must be updated every 90 days thereafter.
- A particular rating scale must be used for all Consumers with a specified group of diagnoses every 60 days after receiving the diagnosis.
- All Consumers who receive Medicaid funding or SSI payments must have a financial recertification annually on the anniversary of their service period start date.
- A Provider should be alerted when their license or certification is scheduled to expire.

The Workflow Designer is the tool used for defining workflows and all associated logic pertaining to the events, actions and results that should occur per a prescribed workflow.

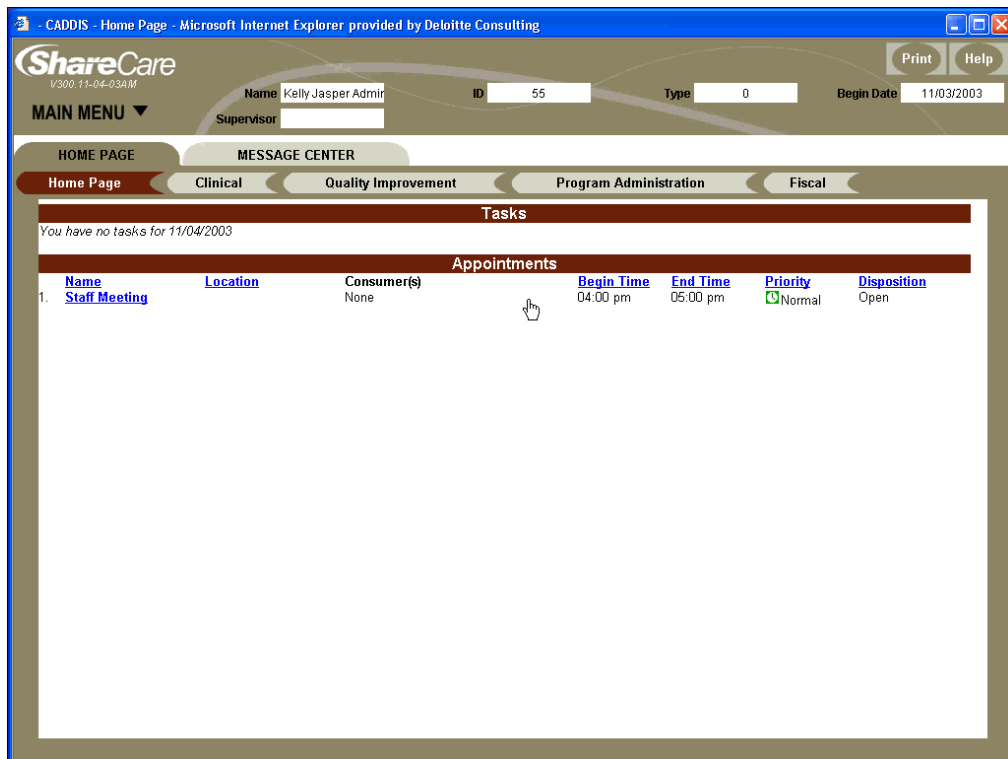


## CADDIS Demonstration Instructions

- Click the Forward Arrow button on the bottom of this screen to view the demo.
- You must view the entire demo, which ends at the specified place in the Notes page.
- You can not “pause” the demo in the middle of it, you must view each demo (one per slide) in its entirety. You can skip back and forth through the slides, but the demo will always start right at the beginning.
- The speed of the demo will be dependent on the machine which you are using.
- Once you are finished viewing the demo, click the Forward Arrow button to continue to the next slide.



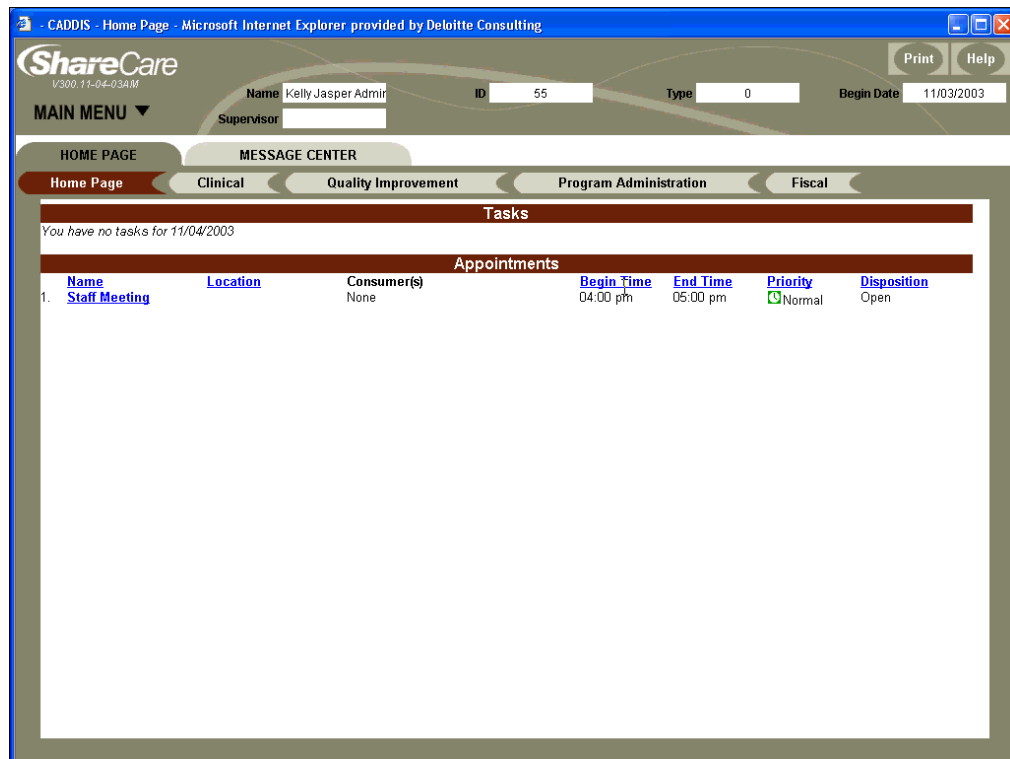




We will now demonstrate a few of the system administration activities. These include setting up a user, viewing a workflow, and viewing an alert. We will go into much more detail in system administration training.

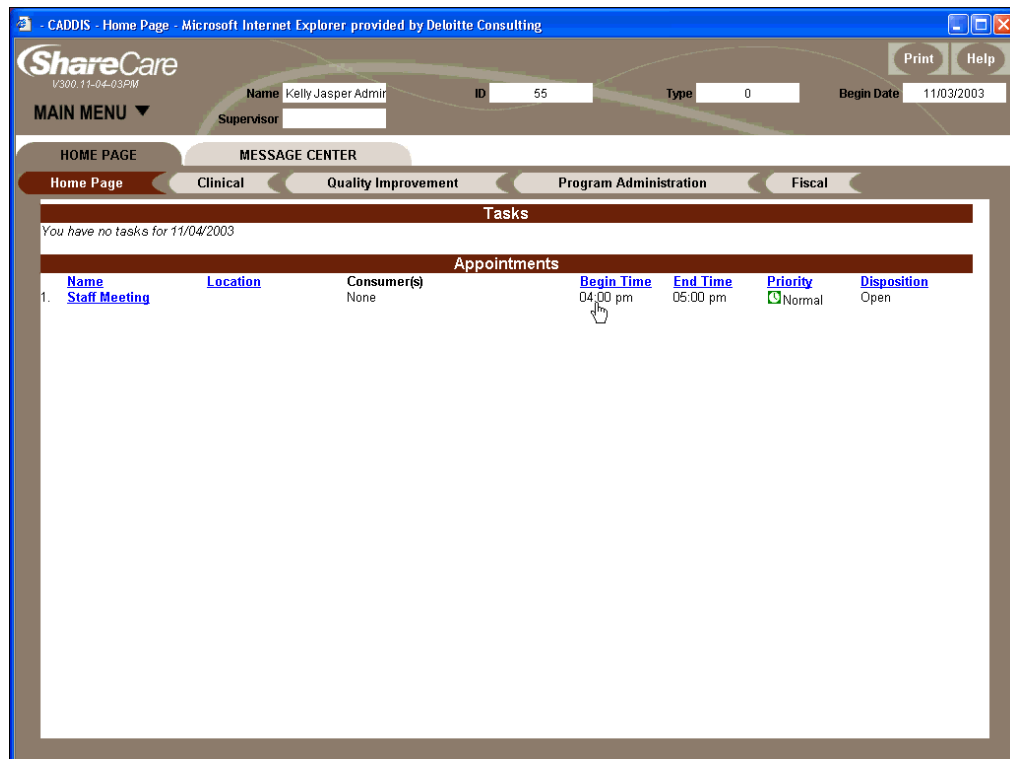
#### Demonstration One Notes:

1. Let's set up a new user in CADDIS.
2. We navigate to the Administration Main Menu and Security sub-menu. This first screen gives you an overall view of User status and associated Regional Center.
3. We then click the Add New User button. Let's enter a new user by the name of John Douglas. We enter jdouglas as his user name. It is not required to use this format, but is an easy user name to remember. We enter "password" for his password. We re-enter to verify. Note that you can choose any initial password, as users are encouraged to change them as soon as they first enter CADDIS.
4. We enter John Douglas in the first and last name fields. We need to assign him to an SSO and let's give him access to Amase. For the sake of time, we will not add information in all of the non-required fields, but it is best to add as much information as possible in order to make the record as complete as possible. As we scroll down the fields, note that you have the option of selecting which home pages to which John has access. In addition, you are able to choose whether the user has access to perform state-wide searches or only local searches.
5. When complete, we click Add User.
6. Let's now click Update User. New flags appear, allowing us to assign signing rights to John as well as restrict any field. Note that as we scroll down the screen, we are now able to enter even more information, such as whether John is able to access the Message Center.



#### Demonstration Two Notes:

1. Let's look at a Workflow that has been created in the system. To do so, we go to the Administration Main Menu and Workflow Designer sub-menu. The first screen shows us the days and times that the workflow processor will not be run. Usually, this is set to run NOT during normal business hours.
2. Next, we click the Workflow Builder tab to search for and select an existing workflow that has been established in the system. Note that each Workflow needs to have a context in order to work properly. This Context is built on the Context Builder tab and associated when you add a new workflow.
3. Let's view the information for the event.
4. We'll click the Event Assignments flag to view to whom the alert will be sent.
5. Finally, we click the Event Logic flag to view the logic and rules behind the alert.



#### Demonstration Three Notes:

1. Now let's take a look at the kinds of alerts and messages available in CADDIS. DDS will maintain this configuration screen, while system admins will set up the user groups and distributions lists.
2. We choose Messaging and Alerts from the Administration Main Menu. As you can see from the top of the screen, you can choose whether to turn options on or off.
3. Scrolling down to system alerts, you can select and edit what type of alert should be sent and how often. In this case, an alert will be sent to an author of an assessment if it has not been signed in CADDIS within 15 days.
4. Scrolling down further, we can view more settings for messaging and alerts.

That's all for our high level overview of system administration. The system administration training will cover all of these topics and more in detail.



This concludes the System Administration module; please click the links to the left if you wish to view any of the slides or demonstrations again.

